

Sagacious Asset Protection
Trust Education 5
The Trust Process (Part 2)

DISCLAIMER

The information shared in this presentation is for information and education purposes only, and must not be taken as personal advice or a recommendation.

Due to the extensive nature of information relating to Trusts what we share in this presentation is an overview and must not be construed as being complete or entire.

It does not take into account your personal circumstances needs, requirements or financial objectives.



Sagacious Asset Protection



Review: The Parties to a Trust

Settlor

Trustees

Beneficiaries

Executive Manager

Protector

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Review: What sort of person makes a good Trustee?

- 1. They Have a Trust.**
- 2. You Trust them.**
- 3. They possess a sense of responsibility to their appointment.**
- 4. Understand the requirement for Confidentiality & Privacy.**
- 5. Can make decisions for the sole benefit of the Beneficiaries.**
- 6. Prepared to devote some time to gain knowledge and understanding to manage and administer the Trust.**

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Review: What to Place in Your Trust

Legally speaking any lawful item
may be placed into a Private Trust.

However, practical considerations must apply.

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Review

The **Settlor** creates the **Trust** using
a **Trust Deed**.

The Trust Deed details
exactly how the Trust is to be
Managed and Administrated
by the **Trustees**



The Trust Process



Review

The **Trust Deed**
is signed and dated by:

The Settlor
The First Trustee
The Second Trustee



This is a Requirement under Contract Law

The Trust Process



The **Settlor** appoints the **First Trustee**
The **First Trustee** appoints the **Second Trustee**

Open a Bank Account*

Settlor is appointed as **Executive Manager***

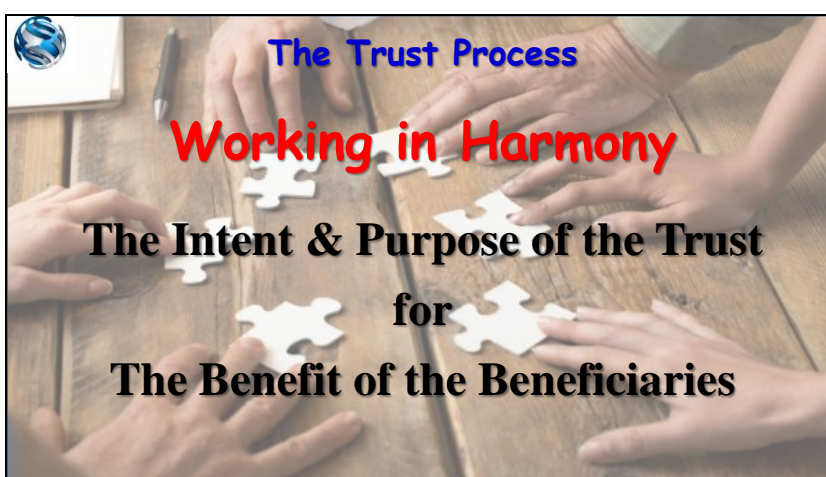
Settlor appoints **Protector***



The Trust Process

Working in Harmony

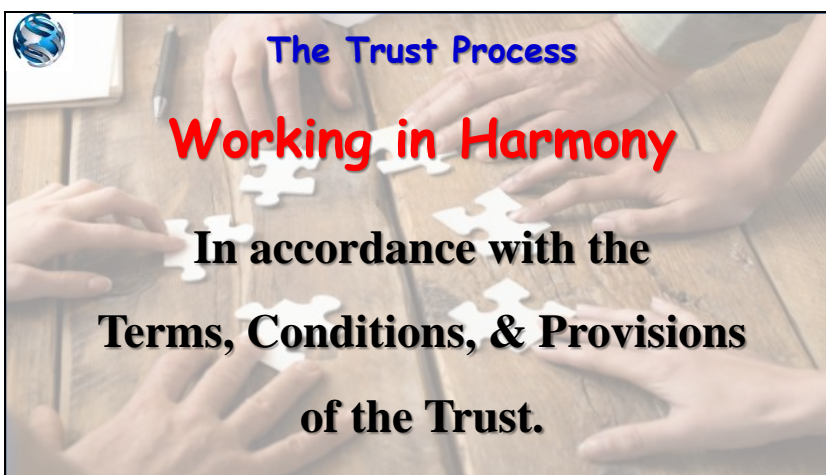
The Trustees
The Executive Manager
The Beneficiaries
The Protector



The Trust Process

Working in Harmony

The Intent & Purpose of the Trust
for
The Benefit of the Beneficiaries



The Trust Process

Working in Harmony

In accordance with the
Terms, Conditions, & Provisions
of the Trust.



The Trustees

Run all the affairs of the Trust
with consideration to
requests from the

Executive Manager and the **Beneficiaries.**

The Trustees

All decisions and resolutions **MUST** be minuted and those minutes are attached to the **Trust Deed**.

The Executive Manager

Deals with the day to day stuff
Liaises with Trustees
Cannot distribute funds

The Beneficiaries

Can be involved in supporting the objectives of the Trust.

The Protector

Is the **Guardian Angel**.
They monitor the management and administration of the **Trust** to ensure all decisions and resolutions are in the best interests of the **Beneficiaries**.

Good **Communication** creates synergistic teamwork.

Synergistic **Teamwork** creates limitless opportunities
to grow the value of the **Trust**

